



Barton-Ross

A Financial Services Firm

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ENGAGEMENT LETTER

Thank you for selecting Barton-Ross, A Financial Services Firm, to prepare your income tax returns and provide tax consultation services. This letter confirms the terms of our engagement and the nature, timing, and limitations of the services we will provide.

We will prepare your Federal and State income tax returns from information you furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to request clarification and/or documentation of some of the information. Generally, we will rely on your representation that you have maintained the documentation required by law to support the information you provide, including expenses for meals, entertainment, travel, gifts, vehicle use, charitable contributions, etc. If you are not clear regarding what documentation is needed for any given income or deduction, we will be happy to discuss it with you. Note that you have the final responsibility for the income tax returns and, therefore, you should carefully review them before you sign and file them.

We will provide an organizer for your use. While we do not require its use, it may serve as a useful reminder of items to provide us. Please provide us with originals or copies of originals of all government tax documents including W-2s, 1099s, 1098s, and property tax statements.

We will use professional judgment in resolving issues when the tax law is unclear or when there is conflict among the authorities.

The filing deadline for the tax returns is generally April 15. To meet this filing deadline, we must receive your information in substantially complete form by March 30.

If an extension of time to file is required, we will use the information available to us at the time to prepare the extension. An extension, however, only provides you with an extension to file, not an extension to pay. Taxes paid after April 15 will result in penalties and interest.

Under both Federal and California law, we are required to electronically file your returns. However, you may opt out of electronically filing without explanation. If you would rather not e-file, please let us know and we will provide you with the government opt-out forms you must sign and return to us.

If a joint return is prepared, tax returns and copies of all supporting documents will be made available to either spouse without the consent or notification of the other spouse.

You are responsible for reporting foreign activities. By signing this letter, you acknowledge that you will inform us if you have income from foreign sources or if you have signatory authority over any foreign account. If you are unsure whether income or an account is foreign, we will review it. Note that the penalties for failure to report foreign activities are severe.

Your tax returns may be selected for review by the taxing authorities. If the government selects your return for examination, we will be available to assist you. At our discretion, there may be additional fees for this service.

We generally retain, for seven years, the final work product generated for our clients. After the retention period, the documents are destroyed. We do not keep original documents — they are returned to you after completion of the returns. It is your responsibility to retain your records for possible future use, including possible examination by the taxing authorities.

Our fees for tax preparation services are based on many different factors that include: number of schedules generated, preparation of information, amount of time required to complete the returns, our out-of-pocket expenses, etc. Your tax preparation fee does not include any additional services after the filing of your tax returns. Our fees for tax consultation services are \$200/hour; this applies to any tax services outside the scope of the preparation of tax returns. With advance notice, these fees are subject to change. All invoices are due and payable upon presentation. Tax returns will not be filed electronically until fees are paid. Due to the rising costs of doing business, our tax preparation fees will be raised by 30% this year. Since we have only incrementally adjusted our fees for the past 20 years, we are raising our fees to better match the current market rate.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter and bring it to your tax appointment or return it to our office along with your tax paperwork. Work cannot commence until a signed copy of this document is returned. If this is a joint return, both spouses must sign.

Yours truly,

Lucia R. Ross, CTEC Registered Tax Preparer #A212225

Acknowledged:

Signature: _____ Signature: _____

Print name: _____ Print Name: _____

Date: _____ Date: _____